

The Approach

A growing number of our investors seek to align their investments with their personal values. Our High Impact Portfolios (HIP) invest in companies and funds that are committed to sustainable business practices.

Asset Allocation



Conservative Portfolio

20% Equity, 80% Fixed Income
Seeks income as a primary objective with a focus on capital preservation.



Income & Growth Portfolio 40% Equity, 60% Fixed Income

Seeks income as a primary objective with some long-term capital appreciation.



Growth & Income Portfolio 60% Equity, 40% Fixed Income

Seeks to balance long term capital appreciation with current income.



Growth Portfolio

80% Equity, 20% Fixed Income
Seeks long-term capital appreciation with income as a secondary objective.



Aggressive Growth Portfolio

100% Equity
Seeks long-term capital appreciation.

Allocation percentages represent targets and may not be exact reflections of actual client accounts.

 Equity  Fixed Income & Cash



Strategy Objectives

Long-term focus on performance through full market cycles seeking competitive risk-adjusted returns.*

Active and passive strategies including individual stocks, mutual funds, and ETFs are screened for social responsibility, corporate governance, and environmental factors.



Ideal Investor

The High Impact Portfolio Models are ideally suited for investors seeking to maximize the benefits of passive investments.



Account Minimum

\$100,000



Tax Conscious

Individual client portfolio holdings can be customized to meet investment objectives of tax-conscious investors.

*WCG uses LPL's Diversified Benchmarks and Morningstar's AutoBench by Asset Allocation feature to track relative performance.

Investment advice offered through WCG Wealth Advisors, LLC, a Registered Investment Advisor. There is no assurance that any strategy assures success, protects against loss, or is suitable for all investors. Investing involves risks including loss of principal. An investment in ETFs involves risks such as not diversified, price volatility, competitive industry pressure, international political and economic developments, possible trading halts, and index tracking errors. Fixed income investments are subject to market and interest rate risk if sold prior to maturity. Their values will decline as interest rates rise and they are subject to availability and change in price. Investing in mutual funds involves risk, including possible loss of principal. Investing in stock includes numerous specific risks including: the fluctuation of dividend, loss of principal and potential illiquidity of the investment in a falling market. The payment of dividends is not guaranteed. The return on ESG investments may be lower than if the adviser made decisions based solely on investment considerations. Specific individualized tax advice not provided. We suggest that you discuss your specific tax issues with a qualified tax advisor.

Please note that investment in the High Impact Portfolio Models includes underlying holdings which are focused in areas of environmental, socially responsible, and sustainable business practices. However, WCG's primary objective with this model, along with all models offered, is to maximize financial return. Lastly, clients retain the right to place reasonable restrictions and limitations on these models pursuant to their risk and suitability.